

Reviewer's Checkpoints

- ☐ Explain the purpose of the Performance Management (PM) Program to the raters
- ☐ Discuss your expectations of the rater's role in the PM process
- ☐ Ensure that each rater has the agency's strategic and/or operational goals(s) prior to their performance planning activity
- ☐ Discuss the tools available to the rater
- ☐ Ensure that the rater has scheduled the entire process with each employee
- ☐ Ensure that the rater has successfully completed the required PM training

Questions a reviewer must ask about each review

Performance Planning

- ☐ Does the employee have a current Individual Performance Plan (performance plan)?
- ☐ Is the performance plan written to the mid-point of the rating scale?
- ☐ Does each stated work outcome on the performance plan meet the S.M.A.R.T. formula?
- ☐ Does each of the stated work outcomes relate to the strategic and/or operational goal(s) of the employee's state agency?
- ☐ Are the work outcomes prioritized in order of greatest importance?
- ☐ Is the employee's performance plan consistent (not necessarily identical) to other employees in the same classification and doing the same type of work in the work unit?

Interim Reviews

- ☐ Were at least two interim review discussions conducted after the most recent performance plan discussion?
- ☐ Was the feedback provided during the interim review discussions specific and objective?
- ☐ Were the performance plan and interim review discussions conducted timely? (A minimum of 30 days between each discussion date is required)

Annual Review

- ☐ Are the ratings for each work outcome supported by thorough, specific, objective and fact based observations?
- ☐ Do the rater's ratings of each work outcome support the overall rating?
- ☐ Do the rater's overall comments support the overall rating?
- ☐ Was the annual review discussion conducted timely?
- ☐ Was each of the performance management procedural steps conducted completely?

NOTE: The reviewer must review all documents prior to the rater's discussion with the employee!
The reviewer's approval of the annual review in Edison or signature on the form if created outside of Edison, confirms that the procedural steps were followed and conducted completely.